



# **Development of a Regional Export Strategy for the Creative Industries Services**

## **Value Chain Analysis Report: ARTS & CRAFT**

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**Submitted to: CARIBBEAN EXPORT DEVELOPMENT AGENCY**

8<sup>th</sup> July 2015



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## List of Acronyms

CARICOM	Caribbean Community – regional institution comprising 15 member states
CARIFORUM	CARICOM plus the Dominican Republic.
Caribbean Export	Caribbean Export Development Agency
CCIs	Cultural and Creative Industries
CCS	Cultural and Creative Sector
CDB	Caribbean Development Bank
EC	European Commission
EU	European Union
EU-28	European Union (including 28 Member States)
Eurostat	Statistical Office of the European Union
GDP	Gross Domestic Product
ITC	International Trade Centre (UN)
IDB	Inter-American Development Bank
LAC	Latin America and Caribbean
OECD	Organization for Economic Cooperation and Development
OECS	Organization of Eastern Caribbean States
SME	Small and medium-sized enterprise
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
VC	Value Chain
VCA	Value Chain Analysis

## Country Abbreviations for EU Member States selected for this project:

DK	Denmark
DE	Germany
EE	Estonia
ES	Spain
FI	Finland
FR	France
IT	Italy
NL	Netherlands
UK	United Kingdom



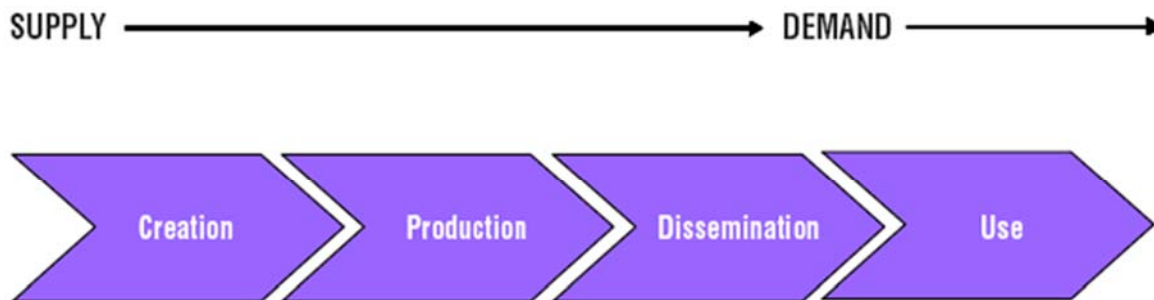
## 1. Introduction

### 1.1. Definition of Value Chains

A value chain, also referred in the framework of the Cultural & Creative Industries (CCIs) as a 'creative chain', has been described as *"a sequence of activities during which value is added to a new product or service as it makes its way from invention to final distribution"* (Botkin and Matthews 1992, p. 26).

The **creative chain** consists of an initial creative idea, which is usually combined with other inputs to produce a culture good or service, through a series of interlinked stages between their production and use. A culture product must be created, produced, possibly manufactured or reproduced, and then distributed before it reaches, or is used by, a consumer. This chain of activity includes a number of distinct steps, usually occurring in business establishments.<sup>1</sup> The basic steps of the creative chain are shown in the figure below.

Figure 1: Basic Creative Chain



In this basic chain, “creation” incorporates “concept” & “design”, while “dissemination” includes marketing, sales, distribution and the other value-added activities that occur prior to use/consumption. Accordingly, the chains will differ according to the good or service, the targeted markets and other factors. However, in order to collect harmonised and, when possible, comparable data, we are going to use a simple value chain as a framework of analysis (linear value chain). Nevertheless, we consider the local ecosystem as a key factor influencing CCIs’ supply chain and their performance. The value chain’s analysis will therefore include the analysis of the policy environment, measures and key actors enabling the sector’s development and growth.

In elaborating on these chains, special emphasis will be placed on determining the existence of and/or practical scope for integration of complementary inputs at any point along the chain, from differing CARIFORUM member states up to and including the final stage of the chain.

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<sup>1</sup> Canadian Framework for Cultural Statistics (2011).



On this basis, this report considers the value chains using a two-fold approach: analysis of the **supply (CARIFORUM) side**, and analysis of the **demand (EU) side**.

With regards to possible business cooperation opportunities in the target EU markets, attention has been given, where possible, to the following *inter alia*: EU distributor or agent (including marketing and promotional activities); joint-ventures and e-commerce platforms - both Business-to-Consumer (B2C) and Business-to-Business (B2B).

## 1.2. Sectoral Scope: CARIFORUM Arts & Craft - Services and Goods

For this consultancy, 6 CIs were selected for study of their value chains reflecting both goods and services: **Music (recorded and live), Film, Fashion, Jewellery, Painting, and Arts & Craft.**

To determine the goods and services that fall within these sub sectors, the team utilised a combination of the definitions used for the CCIs in UNCTAD Creative Economy Report 2010, the UNESCO Framework for Cultural Statistics (FCS) as well as the KEA report of 2006 on the Economy of Culture.

Table 1: Related Services and Goods for Arts and Craft

Related Services	Related Goods (physical and intangible <sup>2</sup> )
Artistic Craft Exhibitions and Trade (All Inclusive E-Commerce)	Emphasis was placed on products which are based on indigenous materials, techniques, skills etc.

<sup>2</sup> Definition derived from [http://en.wikipedia.org/wiki/Intangible\\_good](http://en.wikipedia.org/wiki/Intangible_good) (accessed on 16.11.14).



### 1.3. Geographical Scope: CARIFORUM and European Union

The geographical scope of the project includes all 16 CARIFORUM countries: Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Dominican Republic, Haiti, Grenada, Guyana, Jamaica, Montserrat, St. Lucia, St. Kitts and Nevis, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago.

On the EU side, the Consultancy considers selected markets of the European Union to explore trade opportunities: Denmark, Estonia, Finland, France, Germany, the Netherlands, Spain, Sweden and the United Kingdom (9 Member States).

### 1.4. Methodology

The methodology employed in this Consultancy combined desk research, face-to-face interaction, online surveys as well as virtual communication in order to achieve the expected results.

This multifaceted approach is summarised below:

- Overview of CCIs locally and examination of export opportunities along the value chain:
  - o Desk research to collect preliminary data (quantitative and qualitative) on the export value chains of the selected sub sectors of the CCIs in Caribbean countries, and to gather information on target markets for exports (EU countries).
  - o Meetings with stakeholders, where necessary to supplement the desk research.
- Comprehensive mapping of the value chains for the CCIs in selected EU Member States, and identification of opportunities for CARIFORUM CCIs – using a combination of an online survey, desk research and fieldwork.
  - o Online questionnaire (survey) was designed in SurveyMonkey for use across the Caribbean by the core team and Local Exports in consultations with creative practitioners.
  - o Fieldwork at local level was conducted by the network of Local Experts, under the guidance of VPAJ, each with responsibility for collecting data, assessing the specific situation, engaging with potential stakeholders, and recording their views. This equivalent work in the EU member states was conducted by KEA.
- **Road map** for enhancing the competitiveness of CCIs in entering the value chain which considers export growth potential and existing bottlenecks, with accompanying **strategy and action plan** to address the constraints faced by CARIFORUM CCIs practitioners in their exports. Wherever possible, this references international best practices, and puts forward recommendations for CARIFORUM CCIs, including niche markets, important festivals/trade fairs, key actors for partnerships at international level as well as cooperation arrangements for mutual benefit (e.g. joint ventures, visibility in partners' markets, twinning and exchange programmes etc.). As relevant,



the strategy also provides recommendations on potential clustering opportunities in CARIFORUM countries to e.g. develop joint marketing strategies, lower export costs, and improve the visibility of their products and services in priority markets.

- Through industry validation of this Final VCA Report, the team will make the necessary adjustments to correct for errors or oversights, and to reflect critical additional input.

### *Survey respondents*

The following discussion is based on the results collected through this survey exercise for the 62 professionals who specified 'Arts & Craft' as their *main* industry. They are based in 15 of the 16 CARIFORUM countries.

Only in some instances is the full survey dataset discussed: 410 creative professionals involved in the 7 CCI/sub-sectors, based in 15 CARIFORUM countries (as of 31<sup>st</sup> May 2015).

### *Methodological limitations*

The most significant methodological limitation has been the varying – and at times, small – numbers of creative professionals who participated in the survey. The resultant sample size at times limited the authors' abilities to reach conclusions for some of the survey questions. The authors therefore hereby acknowledge that this report does not present a *definitive* characterisation of the CARIFORUM CIs, but rather provides a foundation upon which to build.

### *Reports*

An **industry-specific Value Chain Analysis (VCA) Report** like this one has been drawn up for each of the six CIs under review - namely **Music (recorded and live), Film, Fashion, Jewellery, Painting, and Arts & Craft**. The results from each are aggregated into an overarching report, entitled "Development of a Regional Export Strategy for the Creative Industries Services: **Value Chain Analyses Final Report**". Whilst the latter includes some industry specificity, it is recommended that the relevant industry-specific VCA Reports are read in conjunction with the Final Report.

## **2. Mapping the Value Chains for CARIFORUM CIs**

As mentioned, this report considers the value chains for the selected CIs using a two-fold approach: analysis of the **supply (CARIFORUM) side**, and analysis of the **demand (EU) side**.

The value chains developed are based on the schematology of Film by Aarhus, Alexandra Institute and High Tech Accelerator Innovation Centre (2011). The industry-specific value chain for Arts & Craft is discussed in Section 3.3.1, and presented in Figure 2 with the survey respondents mapped to each activity. The actual number of respondent involved in each type of activity is given in the table in Annex 1.





### 3. Market Opportunities for CARIFORUM's Arts & Craft Industry

#### 3.1. Trends in the EU for Arts & Craft

The Arts and Craft sector is not clearly defined in the EU, but can be considered to also be part of the Jewellery and Visual Arts sector. The turnover in 2011 was estimated to be €46,337 million<sup>3</sup>.

Currently changes are being made to the classification methods of the crafts sector to ensure that it is also part of the creative industries. For example the definition of the craft sector was recently revised in the UK to cover the manufacture of jewellery under the Standard Industrial Classifications (SICs) as well as the following occupations under the Standard Occupational Classifications (SOCs): smiths and forge workers, weavers and knitters, glass & ceramics makers, decorators & finishers, furniture makers and other craft woodworkers.

In Spain, the crafts sector covers wooden furniture (40 %), jewellery and textile (11% to 12%) and ceramics and leather (6%). The number of companies working with in other subsectors such as marble, stone and plaster, metal, glass, wooden objects and musical instruments is very low.

The following table gives information on the number of companies, employment and turnover of Arts and Craft in Spain and in the UK.<sup>4</sup>

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<sup>3</sup> "Creating growth, Measuring cultural and creative markets in the EU" (EY Report, 2014)

<sup>4</sup> [A survey carried out on behalf of Creative Scotland](#) and other UK craft agencies revealed that Scottish craft contributes over £70 million to the economy, from an estimated 3,350 Scottish craft makers. As of April 2013, Craft Scotland feature profile pages for 1,574 Scottish based craft makers; nearly 47% of this thriving sector.



Table 2: Facts and figures on the Spanish and UK Arts & Craft Industries

Country	ES <sup>5</sup>	UK <sup>6</sup>	
Companies	61,657 (44,744 natural and 16.883 legal persons)	11,620	
		0.2% of UK businesses	
Employment	194.000 employees, 48,8% work in companies with less than 10 people. 70.000 persons (36, 1%) are self-employed	149,500 employees in the craft economy (43,250 craft companies, 9,630 in other creative companies and 96,360 in non-creative companies)	
Turnover		£1.9 billion	
		0.1 % UK turnover	
Gross Value Added (GVA)	4.004 million Euros	£746 billion	
	0,4 ES GVA	0.3% UK GVA	

<sup>5</sup> Source: Funarte Document on “The Spanish Crafts Sector in Statistical and Documentary Sources” See link: <http://www.fundesarte.org/wp-content/uploads/2012/03/Crafts-in-Spain.pdf>

<sup>6</sup> Source: Report Craft Council (2014) “Measuring the craft economy” See link: [http://www.craftscouncil.org.uk/content/files/Measuring\\_the\\_craft\\_economy-v4.pdf](http://www.craftscouncil.org.uk/content/files/Measuring_the_craft_economy-v4.pdf)



### 3.2. Good practices in the EU Member States

National craft associations in Europe support their members to develop their business, sell and promote their works by organising national exhibitions/fairs as well as assist in opening new markets and exporting their works. In particular they assist their members in taking part in international trade fairs.

There are two good practices that can be mentioned here:

**Directory of high-quality craft and makers**<sup>7</sup> - the UK Crafts Council launched in May 2015 an easy easy-to-use online directory of high-quality craft and makers. All crafts are represented including automata, basketry, ceramics, glass, shoemaking, millinery, furniture, jewellery, silversmithing and textiles. It is a platform for thousands of makers across the UK to showcase their work and skills to a global audience and it is expected to become the number one resource for finding exceptional craft across the UK. Each maker profile has a portfolio of projects showing their work alongside an artist statement, an up-to-date news section, their CV, social media links and much more. Internet users can search by maker, discipline, material, location, price range and follow makers on the site as well as sharing the things you find on social media.

**International Charter of Artistic Craftsmanship** - in 2010 the *Ateliers d' Art de France* (FR), *CNA Nazionale* (IT), *Confartigianato Imprese Nazionale* (IT) and *Artex* (IT) signed an International Charter of Artistic Craftsmanship to highlight the values and characteristics of the sector and give greater visibility to artistic productions at European and international level.<sup>8</sup> The Charter has in the meantime been signed by others institutions such as: Master Alliance of Art Ceramic in China, la Kyoto Traditional Arts and Crafts Sponsorship Foundation (Japan), *Oficio y Arte* (ES) and the 'APCMA (*Assemblée Permanente des Chambres de Métiers et de l'Artisanat*). The Charter also calls for projects to support the internationalization and commercialization of products of artistic craftsmanship. It mentions four areas:

1. Participation in trade fairs and expositions to sell craft products. Parallel to the trade events training and business development activities should be organised.
2. Networks of shops and/or galleries specialised in the sale of artistic craftsmanship should be identified and/or created.
3. Improve links with standard commercial circuits and top interior design companies.
4. Co-promotion initiatives with large-scale distribution

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<sup>7</sup> <http://www.craftscouncil.org.uk/directory>

<sup>8</sup> [http://www.wcc-europe.org/sites/default/files/The\\_International\\_Charter\\_of\\_Artistic\\_Craftsmanship\\_1.pdf](http://www.wcc-europe.org/sites/default/files/The_International_Charter_of_Artistic_Craftsmanship_1.pdf)



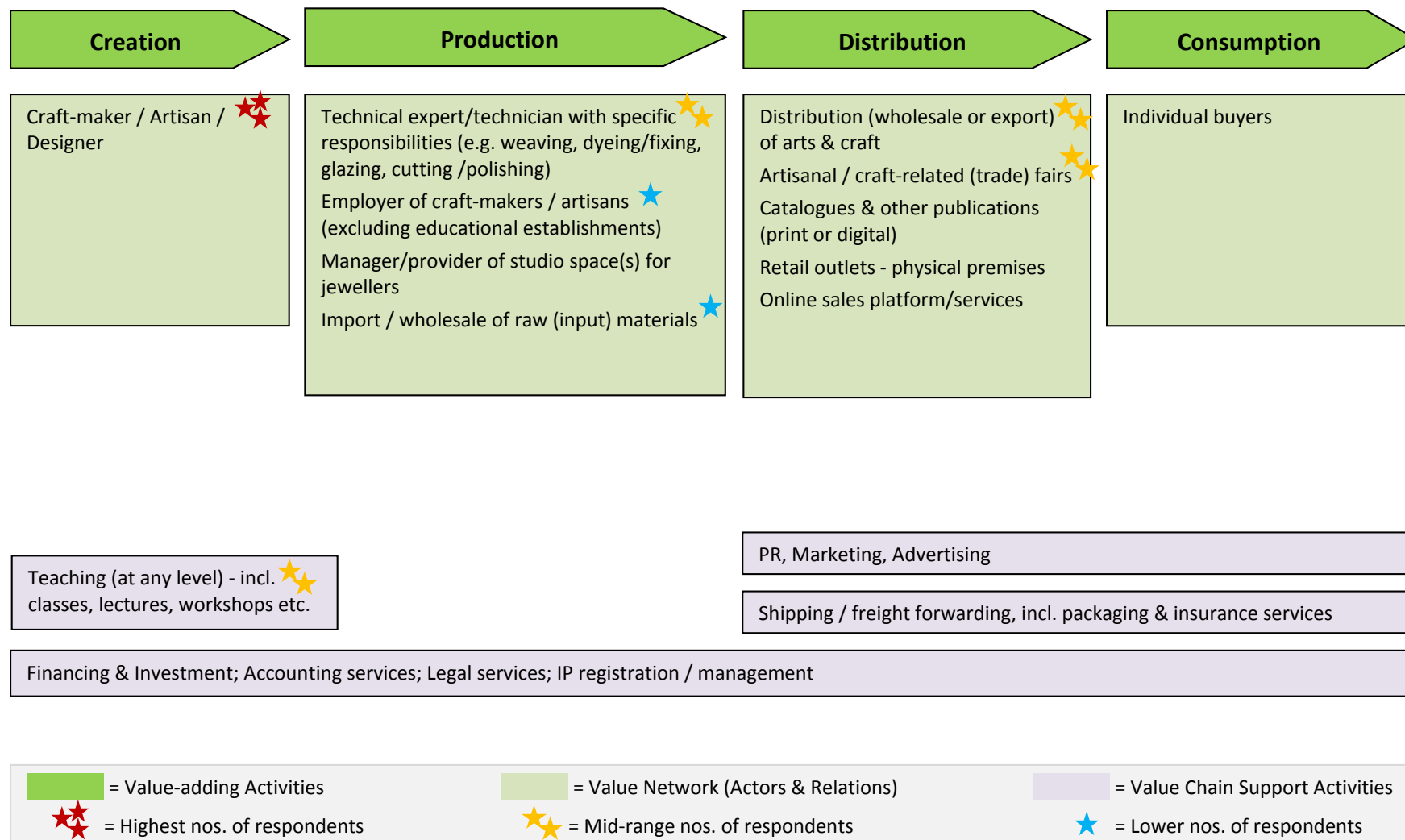
### **3.3. Trends in CARIFORUM for Arts & Craft**

#### **3.3.1 Characterisation of CARIFORUM Arts & Craft industry**

- Of the 62 Arts & Craft respondents, most are involved in the “creation” stage. This is followed by certain activities in the “production” and “distribution” stages as well as Teaching. Their distribution along the CARIFORUM Arts & Craft value chain is illustrated in Figure 2; and the actual number involved in each type of activity is given in the table in Annex 1.
- Many Arts & Craft professionals also work in the other CCI under review – most notably ‘Jewellery’, ‘Painting’ and ‘Fashion’ (in the “creation” and “production” stages; as well as certain distribution activities for ‘Jewellery’ and ‘Painting’).
- Almost 85% of respondents fully own their business; and almost 70% have their business registered under their country’s national law.
- Almost 70% of respondents work in their business full-time, as compared to 31% part-time.
- 33% have full-time (FT) employees, of whom the majority had 1-4 FT employees (80%) followed by 5-9 FT employees (20%). By contrast, 45% had part-time (PT) employees; and of these, 90% had 1-4 PT employees. One respondents had 10-15 PT employees; another 21+ PT employees.
- 38% of respondents provide both Arts & Craft-related services and goods (whether physical or ‘intangible’ (virtual, digital); 8% provide only service(s) and 54% only goods.



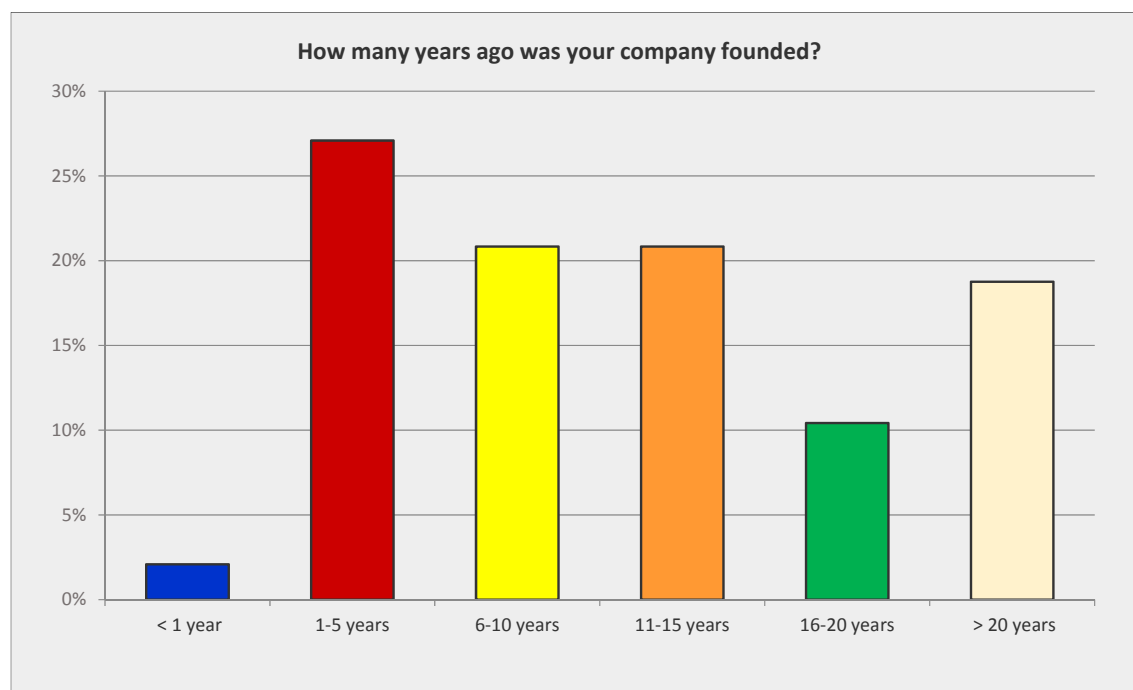
Figure 2: Mapping of respondents along Value Chain for CARIFORUM Arts & Craft





- There is considerable variation in the longevity of respondents businesses, from < 1 year to 50 years. The majority however fall within the 1-5 year range. By contrast to the other CIs under review, there were about equal numbers in the 6-10 years, 11-15 years and > 20 years ranges.

Figure 3: Company age range for CARIFORUM Arts & Craft respondents



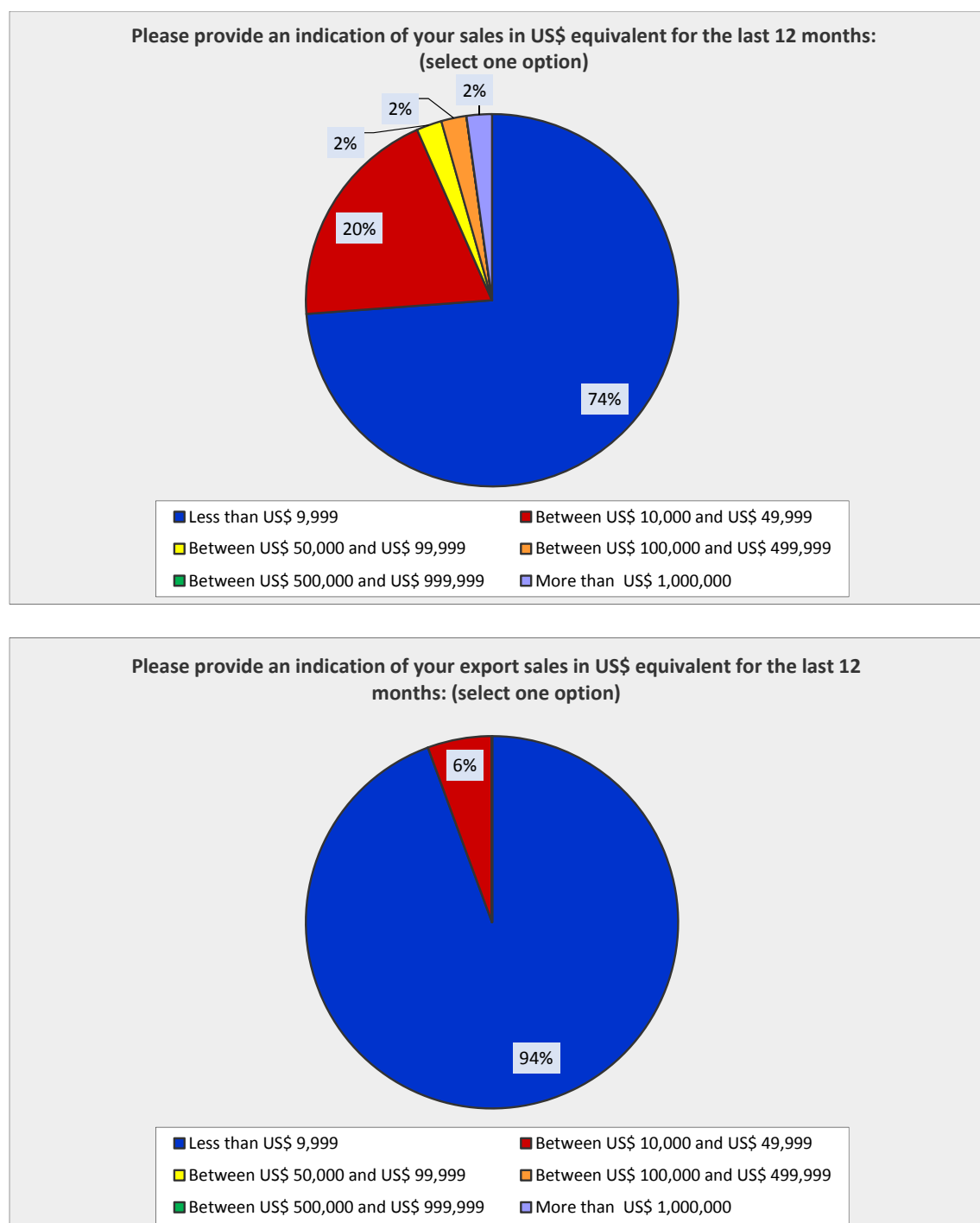
- In terms of their last 12 months, 74% of Arts & Craft respondents recorded sales of < US\$ 9,999; 20% of US\$ 10,000 - US\$ 49,999; 2% each of US\$ 50,000 - US\$ 99,999 and US\$ 100,000 - US\$ 499,999. One respondent indicated sales of > US\$ 1 million. This distribution is illustrated in Figure 4, along with the export sales of Arts & Craft.

### 3.3.2 Current export activities of CARIFORUM Arts & Craft professionals

- Considering their *exports* for the last 12 months, 94% of respondents indicated sales of < US\$ 9,999; and the remaining 6% of US\$ 10,000 - US\$ 49,999. As such, it can be seen that exports do not currently constitute a major component of sales for the Arts & Craft professionals who responded to this survey exercise.



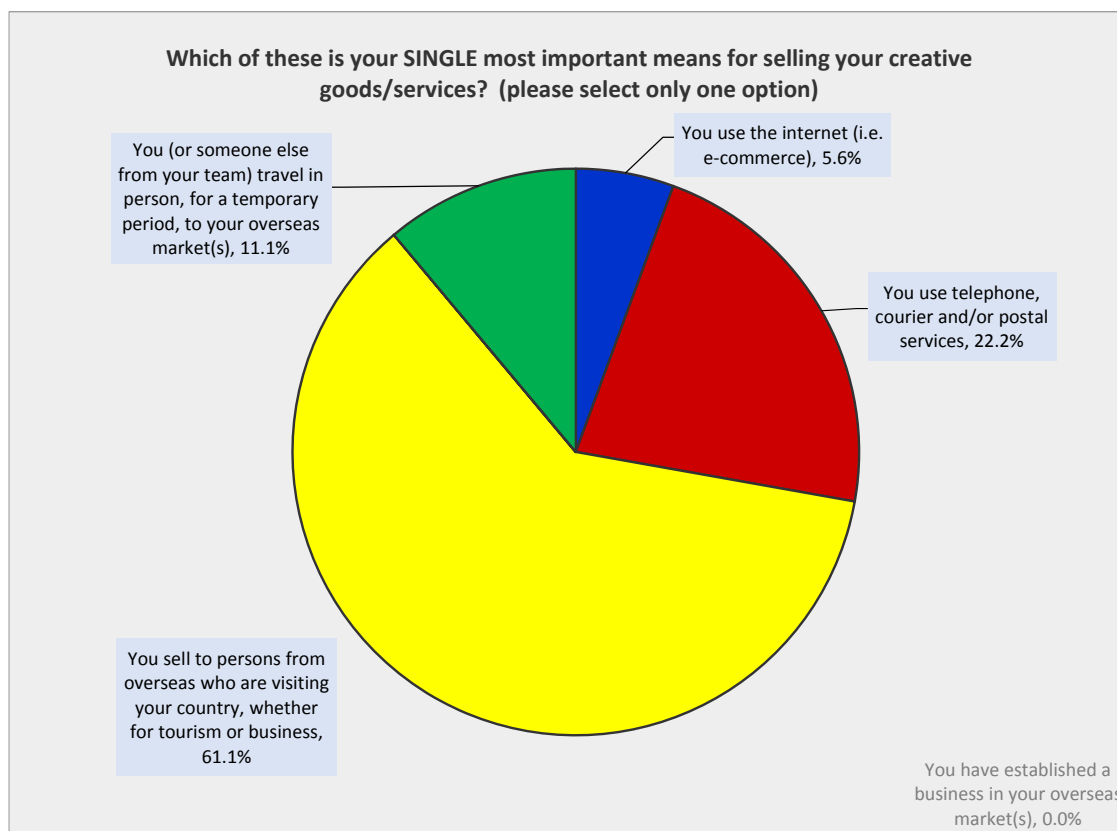
Figure 4: Comparison of total and export sales for CARIFORUM Arts & Craft respondents



- 67% do not have an Export Strategy for their business, the other 33% do.
- 39% of respondents are currently exporting; and they use all export modalities to deliver/sell their creative goods/services, promote and otherwise transact business. The following Figure 5 indicates the relative use of the four export modes considered most important by CARIFORUM's Arts & Craft professionals to sell their goods/services.



Figure 5: Most important export modes for CARIFORUM Arts & Craft professionals



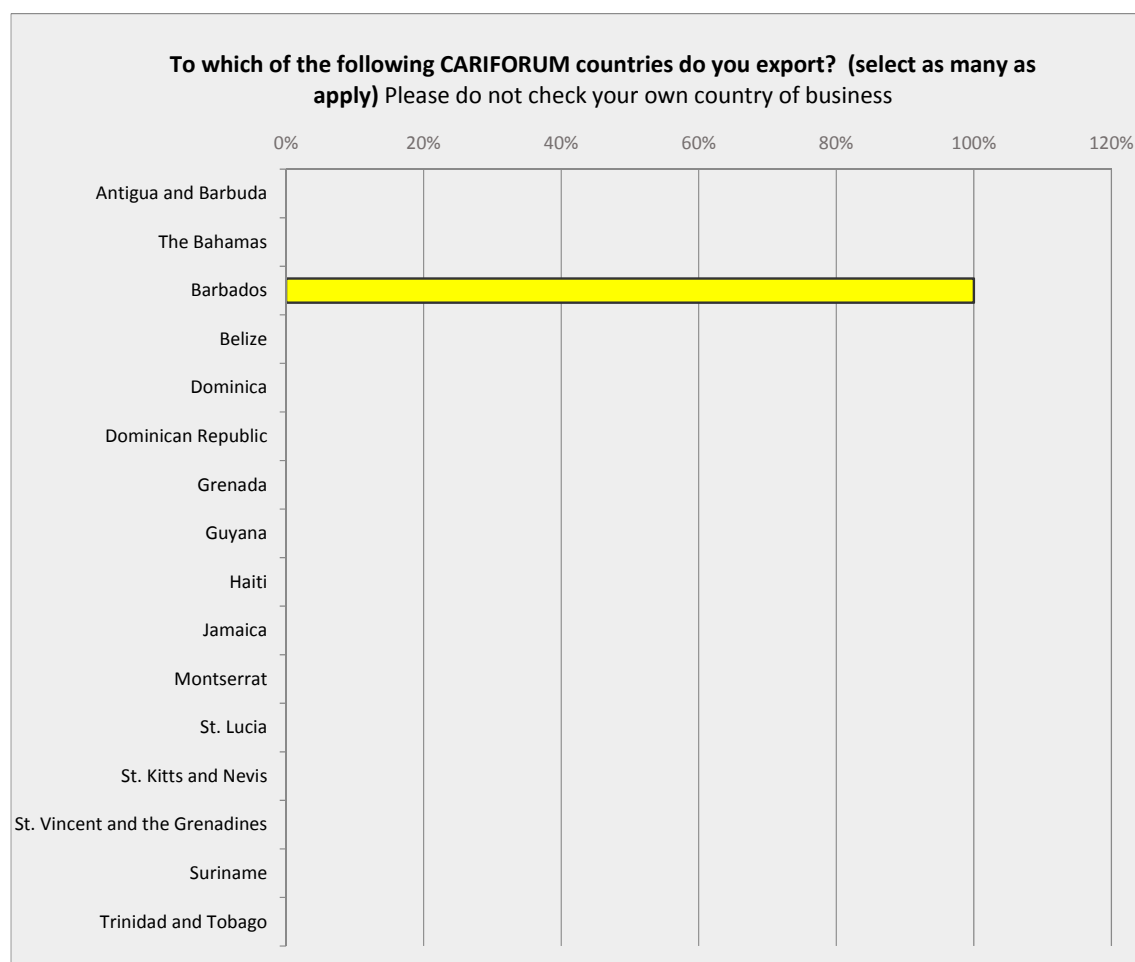
- Specific to their e-commerce activities, respondents listed the following as online platforms/services they employ:
  - o Email , websites (with dedicated with e-commerce links)
  - o Social media: overall, there is widespread use - in particular, Facebook (65% of respondents) and LinkedIn (almost 20%).
- For those who export: (*countries listed in decreasing order of popularity*)
  - o Only 5% does so to another country in CARIFORUM - to Barbados.
  - o 56% export to a country in the EU, with France and Spain being most popular.
  - o 50% export elsewhere in the world, with the US being the most popular followed by countries in Latin and Central America, Africa and Asia.

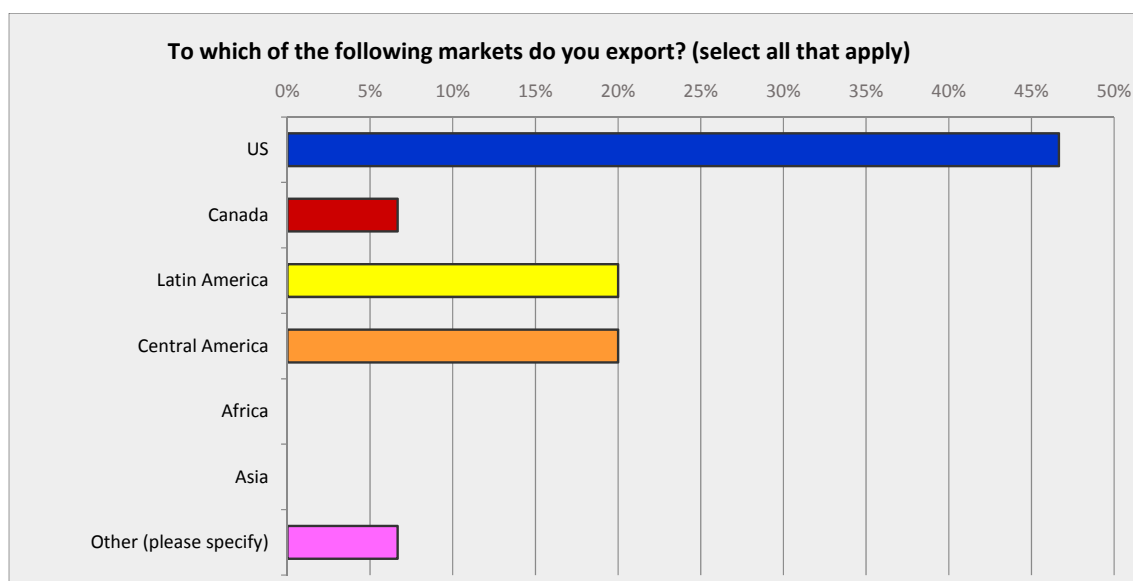
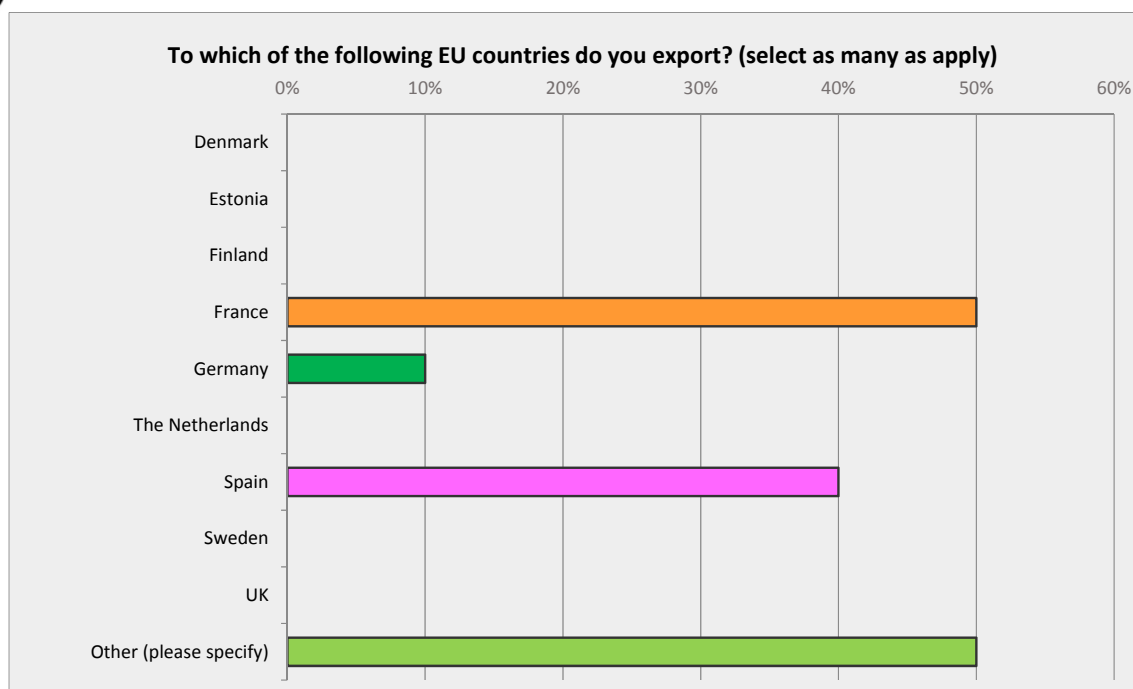
The popularity of the individual countries for export is given in the bar charts in Figure 6. The % is the number of respondents exporting to the country as a proportion of the total number exporting to that region. As some of the absolute values are small, only the relative ranking of countries is discussed above.





Figure 6: Prevalence of exports to CARIFORUM, EU and other markets by CARIFORUM Arts & Craft professionals





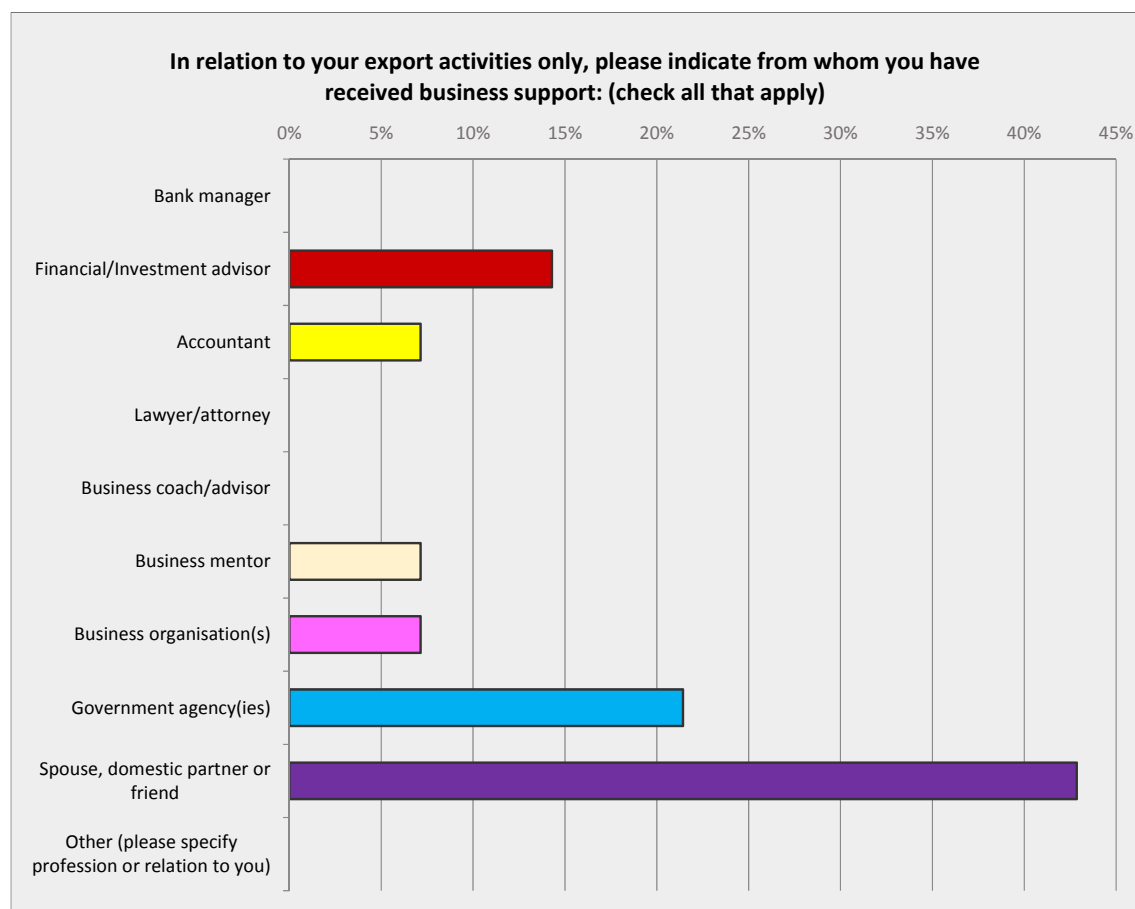
- Of the almost 61% respondents who are not currently exporting, equal numbers 'tried but stopped' as 'never tried' (each 41%). The remainder (just under 20%) 'tried without much (any) success'.
- Of note, almost 74% of respondents who are not currently exporting would be interested in starting (or resuming) their exports. 7% stated that they are not interested; the rest (19%) are not yet interested.



### 3.3.3 Export support framework for CARIFORUM Arts & Craft professionals

- > 80% of respondents noted that they do not receive business support from anyone specific for their export efforts. For those who have, support has come predominantly from a spouse/domestic partner or friend. This is indicated in Figure 7.

Figure 7: Sources of support used by CARIFORUM Arts & Craft professionals for their export activities



- Almost 27% of CARIFORUM Arts & Craft respondents belong to a business organisation, whether local/national, regional or international. For most, this is an 'industry-specific association, network, alliance, or group'. This membership has boosted their export efforts through support including information (events, market advice), training workshops and seminars, joint participation in trade fairs, exposure/visibility, and country branding ("unique Belize).



## 4. Bottlenecks along the Arts & Craft Value Chain

Due to the small size of the domestic markets in nearly all CARIFORUM countries as well as the persistent decrease in local demand, there is need for considerable expansion of foreign markets. Whilst there is scope for the increase of creative exports to the EU, numerous challenges are noted.

### 4.1. Export challenges facing CARIFORUM Arts & Craft professionals

- Almost 55% of Arts & Craft respondents have experienced challenge(s) to their creative exports, to greater or lesser extent. As indicated in the table below, the challenge considered most severe is 'Lack of public support to attend trade fairs, festivals in export markets' and 'Lack of access to financing for export activities'.

Table 3: Rating of export challenges by CARIFORUM Arts & Craft professionals (no. of respondents)

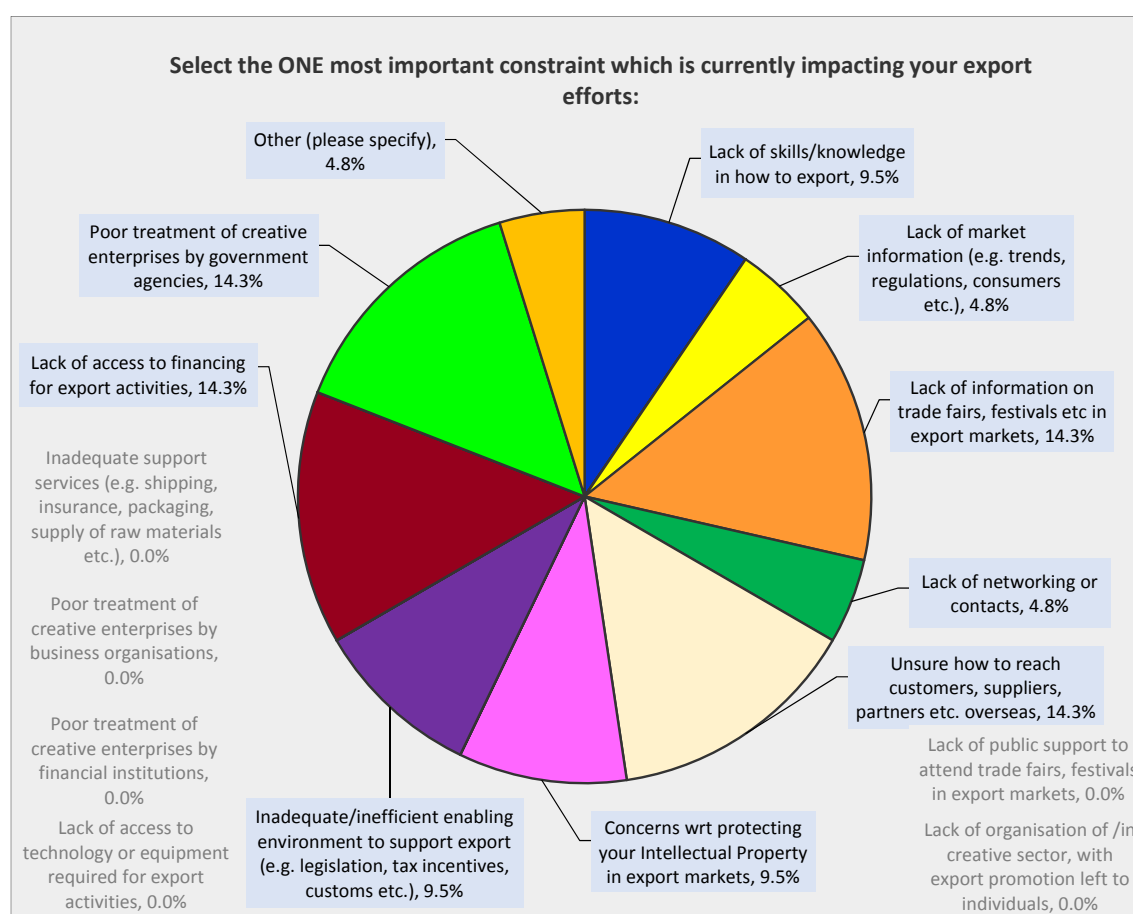
From your own experiences, how would you rate the following challenges to your export efforts?					
Answer Options	Not very important	Quite important	Very important	N/A	Rating Average
Lack of skills/knowledge in how to export	4	4	11	2	2.37
Lack of access to technology or equipment required for export activities	2	6	10	3	2.44
Lack of market information (e.g. trends, regulations, consumers etc.)	0	6	13	2	2.68
Lack of information on trade fairs, festivals etc in export markets	4	2	14	1	2.50
Lack of networking or contacts	4	6	10	1	2.30
Unsure how to reach customers, suppliers, partners etc. overseas	3	5	11	2	2.42
Concerns wrt protecting your Intellectual Property in export markets	5	4	10	2	2.26
Lack of public support to attend trade fairs, festivals in export markets	3	3	15	0	2.57
Inadequate/inefficient enabling environment to support export (e.g. legislation, tax incentives, customs etc.)	4	2	13	2	2.47
Inadequate support services (e.g. shipping, insurance, packaging, supply of raw materials etc.)	4	3	12	2	2.42
Lack of organisation of /in creative sector, with export promotion left to individuals	2	3	13	3	2.61
Lack of access to financing for export activities	2	4	15	0	2.62
Poor treatment of creative enterprises by financial institutions	5	6	8	2	2.16



Poor treatment of creative enterprises by business organisations	4	5	9	3	2.28
Poor treatment of creative enterprises by government agencies	2	4	12	3	2.56
<b>No. respondents = 21</b>					

- As shown in Figure 8, the single most important export challenge facing CARIFORUM Arts & Craft professionals is 'Lack of information on trade fairs, festivals etc in export markets', 'Unsure how to reach customers, suppliers, partners etc. overseas', 'Lack of financing for export activities' and 'Poor treatment of creative enterprises by government agencies' (each selected by almost 15% of respondents).

Figure 8: Most important export challenges facing CARIFORUM Arts & Craft professionals

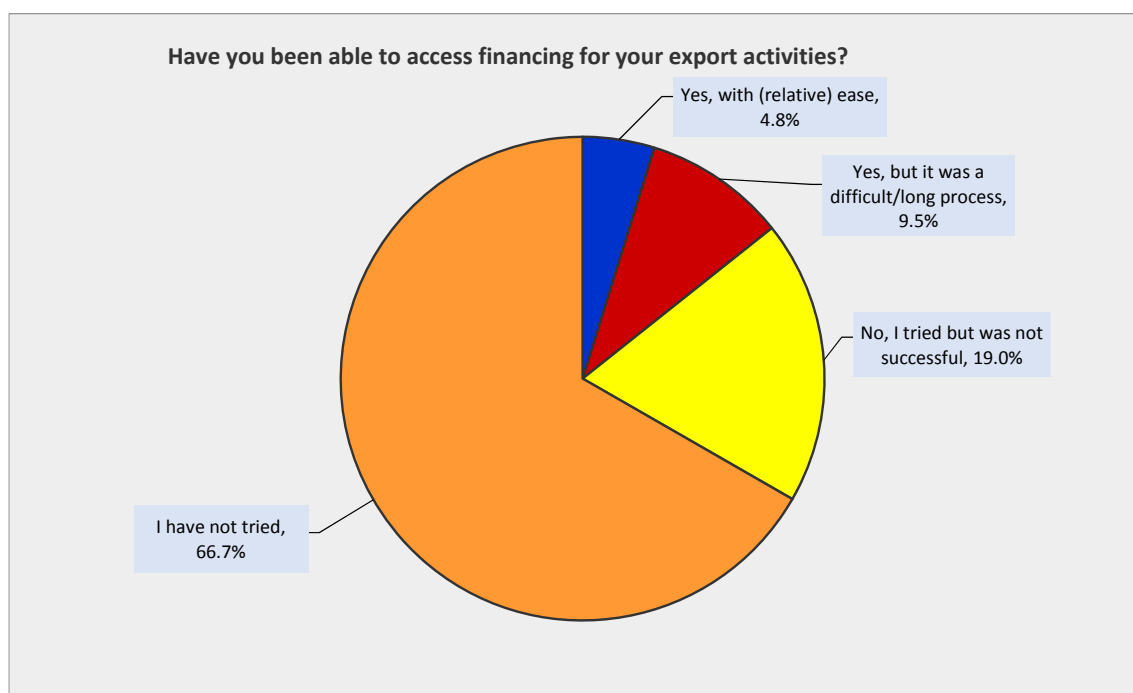


- The following were not noted by any of these Arts & Craft professionals as their *single* most important export constraint:
  - o Lack of public support to attend trade fairs, festivals in export markets
  - o Lack of organisation of/in creative sector, with export promotion left to individuals
  - o Inadequate support services (e.g. shipping, insurance, packaging, supply of raw



- materials etc.)
- Poor treatment of creative enterprises by business organisations
- Poor treatment of creative enterprises by financial institutions
- Lack of access to technology or equipment required for export activities
- Concerns wrt protecting your Intellectual Property in export markets
- As relates to accessing financing for export, < 5% of respondents have been successful, with (relative) ease as depicted in Figure 9. By contrast, almost 10% were successful but after a difficult/long process; 19% tried but were not successful; and 67% have not tried.

Figure 9: Experience of CARIFORUM Arts & Craft professionals to access export financing



- The most (and equally) important challenges in terms of export-related financing is 'Lack of suitable options available' and 'You were unable to meet the lender's security/collateral requirements'. The ratings of the various export financing challenges are presented in Table 4 below. [The small sample size is acknowledged]



Table 4: Rating of export financing challenges by CARIFORUM Arts & Craft professionals (no. of respondents)

Specific to finance for exports, how would you rate the following in terms of their importance?					
Answer Options	Not very important	Quite important	Very important	N/A	Rating Average
Lack of suitable financing options available to you	0	0	3	1	3.00
You were unable to meet the lender's security/collateral requirements	0	0	3	1	3.00
Lender was not satisfied with the state/quality of your business documentation	0	1	2	1	2.67
Lender approved a loan but the amount was too low	0	1	1	2	2.50
Lender approved a loan but the term was too short	0	1	1	2	2.50
Lender approved a loan where the conditions were otherwise unacceptable	0	1	1	2	2.50
No. respondents = 4					

- 53% of respondents did not have to access to venture capital as an option to finance their business's export growth efforts, and 38% were unsure. [Only 2 respondents did have access to venture capital]

#### 4.2. Challenges within EU for CARIFORUM Arts & Craft

The consultants initiated contact with a wide range of European stakeholders, including trade associations in arts & craft sector as well as a range of trade fairs.. The list of organisations and companies consulted can be found in Annex 2.

The aim of the survey was to test possible interest from European arts & craft sector in developing business with Caribbean actors and to know whether there might be a demand from potential European companies.

The results of the survey showed that most stakeholders lacked awareness of the arts & crafts sector of the Caribbean region. However, they are interested in receiving more information on opportunities to do business. Many stressed that it was crucial for the Caribbean arts & crafts to be more visible and better promoted at trade fairs.

It should also be mentioned that the funding programmes for international projects of the EU Member States rarely specifically mention the Caribbean region (for example the Wales Art International programme). This again is due lack of knowledge on what is on offer in the region.



## 5. Recommendations to Boost Export of CARIFORUM Arts & Craft

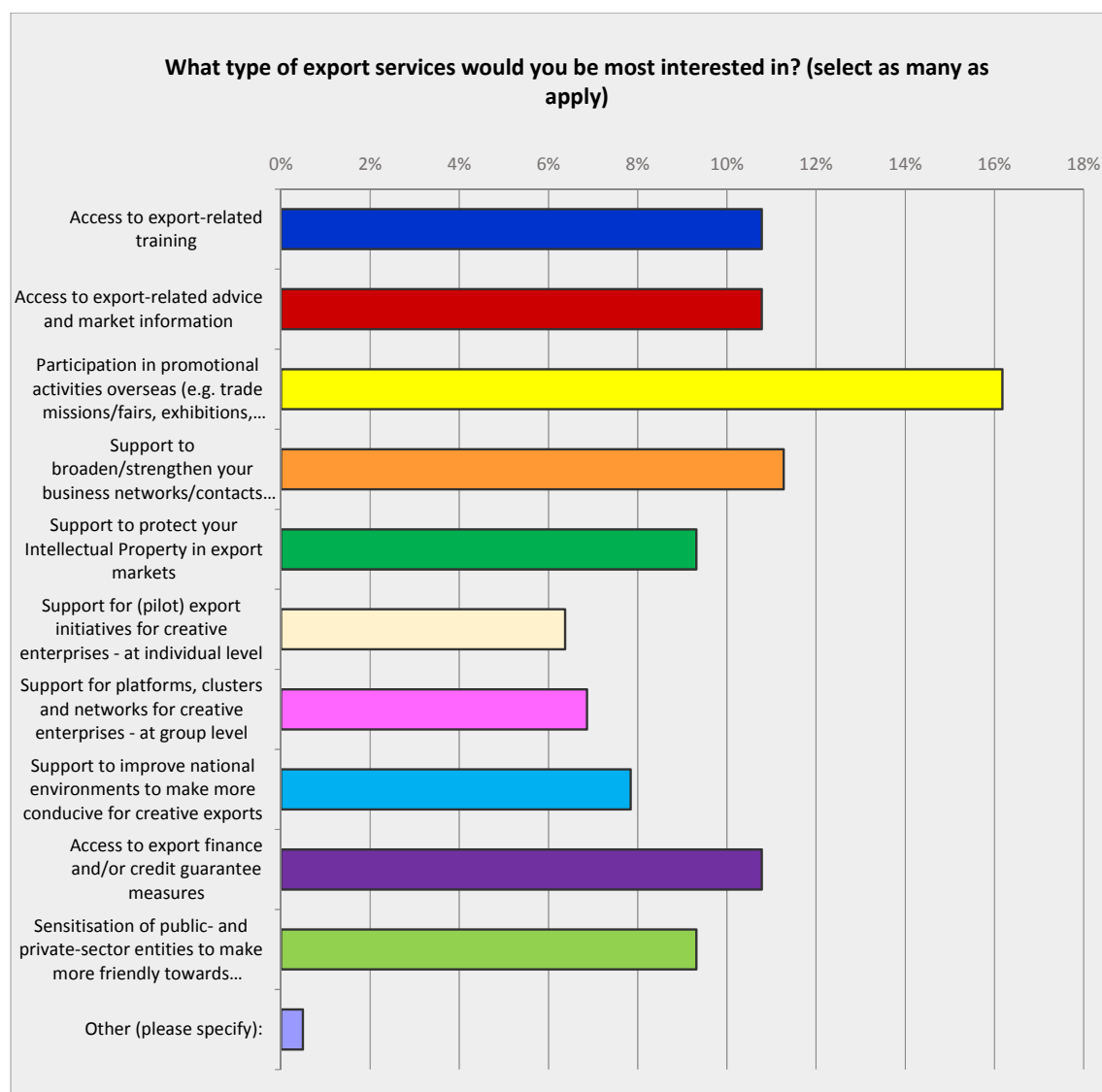
### 5.1. Improving export support for CARIFORUM Arts & Craft professionals

- As previously noted, almost 74% of respondents who are not currently exporting would be interested in starting (or resuming) their exports.
- > 85% of respondents noted their interest in accessing support services to boost their creative exports. As illustrated in Figure 10, when given a selection of possible export-related services:
  - o The most popular was: 'Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc.' (selected by 16% of respondents).
  - o This was followed by: 'Support to broaden/strengthen your business networks/contacts overseas' 'Access to export-related training', 'Access to export-related advice and market information' and 'Access to export finance and/or credit guarantee measures' (each selected by 11% respondents).





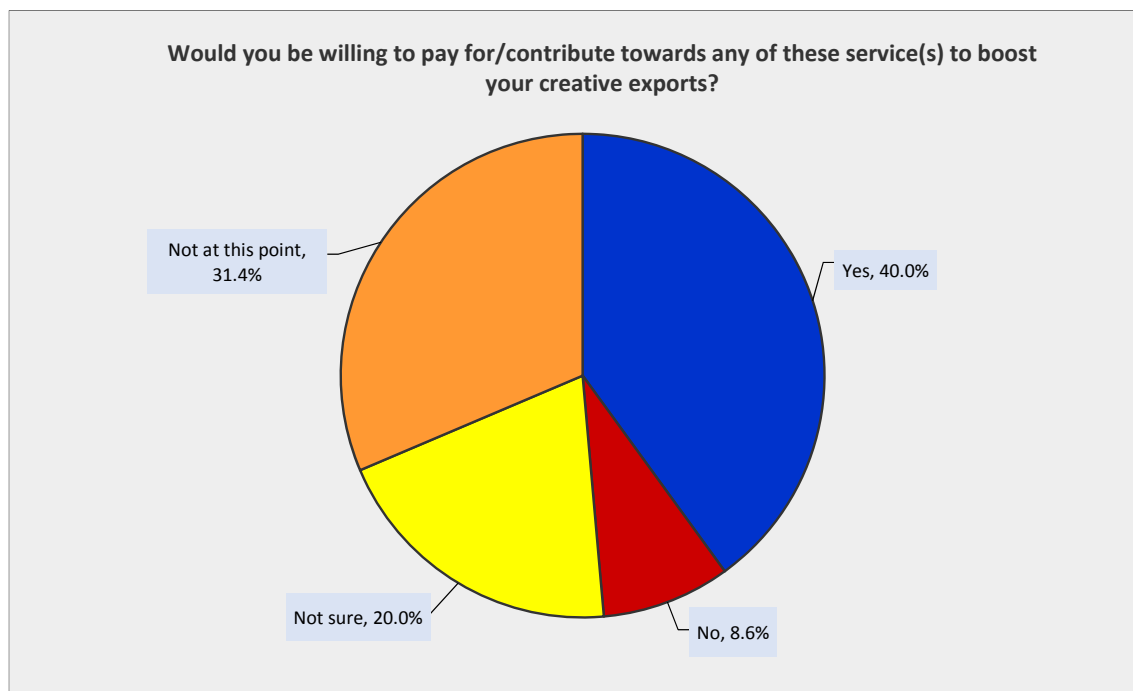
Figure 10: Prioritisation of export services by CARIFORUM Arts & Craft professionals





- As shown in the following Figure 11, 40% stated that they would be willing to pay for/contribute towards such services at this point in time.

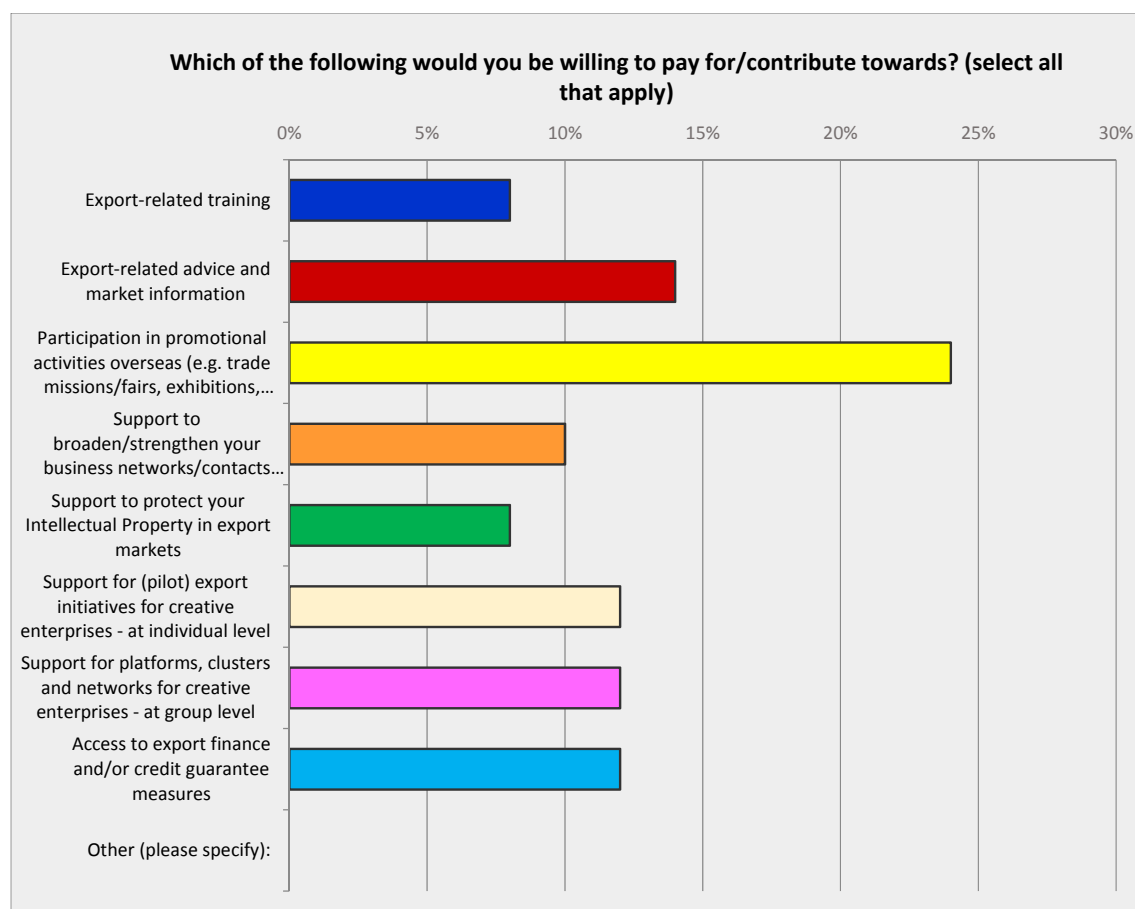
Figure 11: Willingness of CARIFORUM Arts & Craft professionals to pay for export-related services



- Of these export-related services, most of the respondents indicated that they would be willing to pay for/contribute towards 'Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc.' (24%) and 'Export-related advice and market information' (14%). This prioritisation is indicated in Figure 12 below.



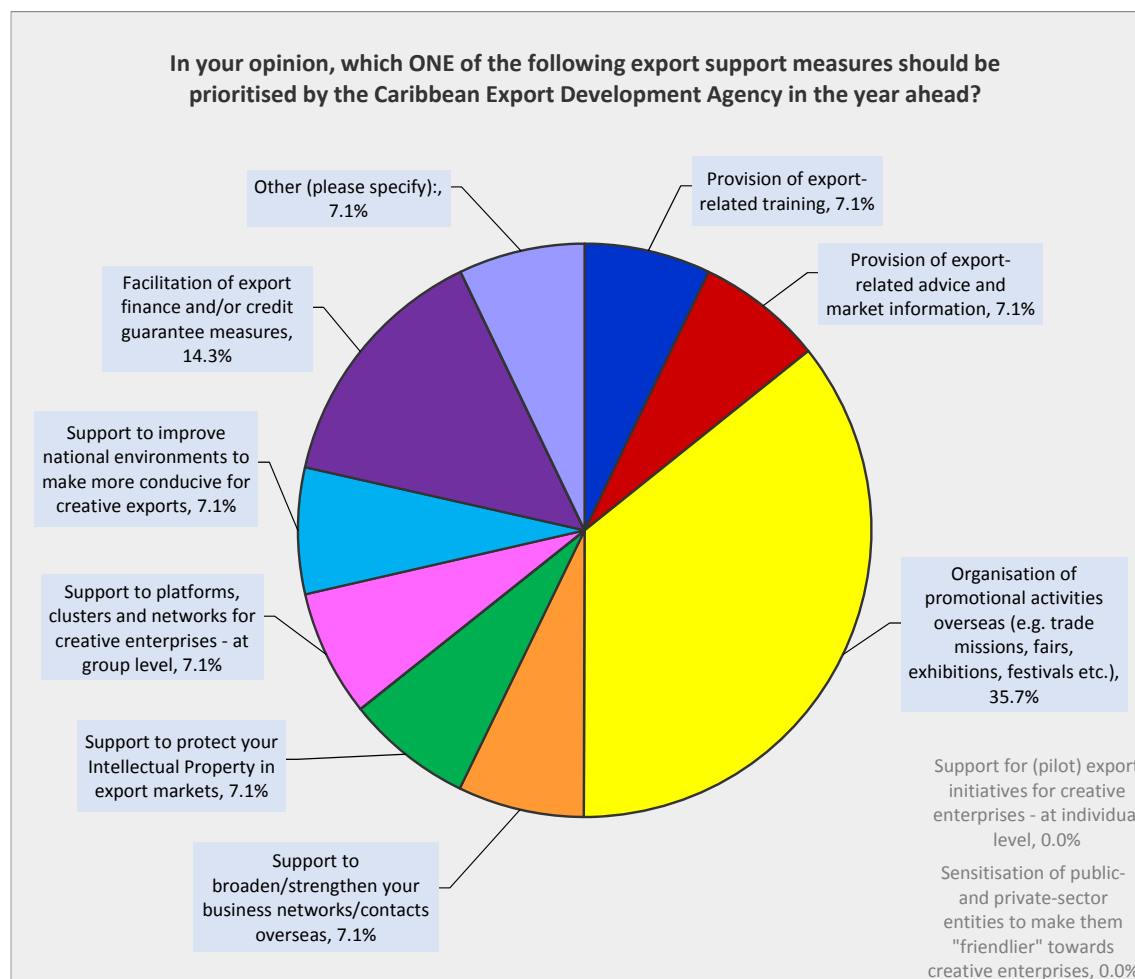
Figure 12: Export services for which CARIFORUM Arts & Craft professionals would pay



- When asked whether they reserve a budget to support their exports, almost 60% responded “no”; and the remainder (40%) responded “not yet”. No respondent indicated that s/he reserved a budget.
- As illustrated in the following Figure 13, when asked which export-related service(s) should be prioritised by Caribbean Export:
  - o The most popular was “Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.)” (selected by over 35% of respondents).
  - o This was followed by ‘Facilitation of export finance and/or credit guarantee measures’ (selected by 14% of respondents).



Figure 13: Export services to be prioritised by Caribbean Export for CARIFORUM Arts & Craft professionals



- The following services were not noted by any of these Arts & Craft professionals as priorities for Caribbean Export:
  - Support for (pilot) export initiatives for creative enterprises – at individual level.
  - Sensitisation of public- and private-sector entities to make them "friendlier" towards creative enterprises.



## **5.2. Good practice in the EU Member States for Arts & Craft**

Nothing specific was found for this report.

## **5.3. Scope for business cooperation between the EU and CARIFORUM for Arts & Craft**

Nothing specific was found for this report.

## **5.4. Image and Reputation of CARIFORUM CCI's**

The arts & craft industry should be part of an overall strategy to improve the image and branding of the cultural and creative industries in the Caribbean region. This strategy should include specific measures and pilot projects for the arts & craft sector.

The arts & craft sector of the Caribbean region is not well known in Europe. In general wholesalers do not offer buyers a range of art & crafts from this part of the world. Most arts & crafts are sourced from Asian countries. The luxury retail sector for home ware indicated that their buyers do not travel to the Caribbean to buy arts & crafts, as they had the perception that there was not enough history or culture behind the art & crafts produced in the Caribbean countries. The products did not have a “story” to tell that made it attractive for European customers.

## **5.5. Structural relations and networks**

The cultural and creative industries are developing themselves globally through structural relations and sustainable networks. This is also the case for the arts & craft sector. Currently the Caribbean arts & craft sector is not well represented in international networks.

Arts & Craft organisations in the CARIFORUM countries should consider signing the International Charter of Artistic Craftsmanship to raise the profile of the sector in the Caribbean region.

## **5.6. Expand commercial activities**

For artists and craftsmen to develop and exploit commercial export opportunities in international markets support and grants should be given to participate in trade fairs and festivals. The assistance should be market-led and responsive to allow artists and companies to take advantage of opportunities as they arise. Grants to cover travel and accommodation expenses should be subject to the approval of a business case. See Tables XXX for an indicative listing.



In addition the arts & craft companies should receive support to develop online activities. Some examples:

- ETSY SHOP - Artists and craftsmen should be encouraged to grow their **independent creative business and open an Etsy Shop**. [Etsy.com](http://Etsy.com) is a global marketplace for craft and design. It is an excellent way to export arts & crafts and reach more than 40 million buyers worldwide and (for the time being anyway) and it is free to an Etsy shop. Artists and craftsmen can access Etsy's free support services and educational resources, including [The Seller Handbook](#), the [Etsy School](#) and the [Etsy Success](#) newsletter. They can also apply to showcase their work at public events, such as the Etsy's [art exhibition](#) and [Etsy House pop up shop](#).
- Trade associations should be encouraged to set up platforms on their websites to sell their members' works online. See example of Craft Scotland : <http://www.culturelabel.com/vendors/Craft-Scotland/>
- Set up craftmap: a digital platform that shows the "who-what where" of the arts and craft: artists, in the CARIFORUM countries: artists, craftsmen, specialist museums, education, materials, production spaces etc. See example of the CCNL: <http://www.craftscouncil.nl/?Craftsmap>



## Annexes



## Annex 1: Details of Survey Respondents – Arts & Craft

Table A1: Breakdown of respondents in CARIFORUM Arts & Craft value chain

If in 'Arts & Craft', please identify what area(s) you work in: (select as many as apply)		
Answer Options	Response Percent	Response Count
Craft-maker / Artisan / Designer	92.3%	48
Technical expert/technician with specific responsibilities (e.g. weaving, dyeing/fixing, glazing, cutting /polishing)	36.5%	19
Employer of craft-makers / artisans (excluding educational establishments)	21.2%	11
Teaching (at any level), incl. lectures, workshops etc.	36.5%	19
Manager/provider of studio space(s) for jewellers	5.8%	3
Import / wholesale of raw (input) materials	23.1%	12
Distribution (wholesale or export) of arts & craft	42.3%	22
Artisanal / craft-related (trade) fairs	57.7%	30
Catalogues & other publications (print or digital)	9.6%	5
Retail outlets - physical premises	25.0%	13
Online sales platform/services	9.6%	5
PR, Marketing, Advertising	7.7%	4
Financing & Investment	0.0%	0
Accounting services	0.0%	0
Legal services	0.0%	0
IP registration / management	0.0%	0
Shipping / freight forwarding, incl. packaging & insurance services	7.7%	4
Teaching (at any level) - incl. classes, lectures, workshops etc.	25.0%	13
Other (please specify)	1.9%	1
<b>answered question</b>		<b>52</b>





## Annex 2: List of Stakeholders Consulted for Arts & Craft in EU Member States

Table A2-1: List of stakeholders consulted for Arts & Craft in EU

Companies / Trade Associations	Activities of VCA	Country
World Crafts Council - Europe	Advocacy, Networking and Promotion	Europe
UK Crafts Council	Advocacy, Networking, Promotion, Distribution	United Kingdom
Art Promotion Centre Finland	Promotion and Making Available of Grants and Subsidies to the Art Sector	Finland
EUNIQUE - Arts & Crafts trade fair in Karlsruhe	Trade fair: Distribution, Consumption	Germany
European Fine Arts Foundation (TEFAF)	Trade fair: Distribution, Consumption	Netherlands
Venice Biennale of Art	Trade fair: Distribution, Consumption	Italy
Salone del Mobile	Trade fair: Distribution, Consumption	Italy
Maison&Objet	Trade Fair: Distribution, Consumption	France
Artex – Centre for Artistic & Traditional handicrafts in Tuscany	Advocacy, Networking, Promotion, Trade Fairs	Italy
Ateliers d' Art de France	Advocacy, Networking, Promotion, Trade Fairs, Events	France
Craft Council Nederland	Advocacy, Networking, Training, Promotion, Events, Exhibitions	Netherlands
Danish Arts and Crafts Association	Advocacy, Networking, Promotion, Events, Exhibitions	Denmark
Funarte	Promotion	Spain
German Crafts Association	Advocacy, Networking and Promotion	Germany
Biennale for Craft and Design	Trade Fair: Distribution, Consumption	Denmark



Companies / Trade Associations	Activities of VCA	Country
Crafts Fair at Frue Plads in Copenhagen	Trade Fair: Distribution, Consumption	Denmark
Import Shop Berlin/Bazaar Berlin	Trade Fair: Distribution, Consumption	Germany
International Frankfurt Fairs Ambiente and Tendance	Trade Fair: Distribution, Consumption	Germany
Salon International du Patrimoine Culturel	Trade Fair : Promotion, Distribution	France
Network for cultural export	Promotion	Finland
FBC London	Distribution, Consumption	United Kingdom
Alb Antiquités	Distribution, Consumption	France
Nilufar	Distribution, Consumption	Italy
Wales Arts International	Promotion and Grants for International Projects	United Kingdom
Edinburgh International Festival	Distribution, Consumption	United Kingdom
Arte Mobilis	Distribution, Consumption	Belgium



### Annex 3: Key EU Stakeholders for CARIFORUM's Arts & Craft Industry

To identify the market opportunities for the CARIFORUM CCI in the EU, a list of the key stakeholders were selected on the basis of the following three criteria:

- **International:** they must have an evident interest in developing relationships with the CARIFORUM region or with experience with international markets.
- **Geographical:** they can be either European or national organisations with a clear international profile.
- **Practical:** they must have a practical approach to international cooperation, and be willing to organise and take part in practical initiatives such as events, seminars, training, B2B development activities, etc.

The stakeholders were grouped per CCI sub-sector and EU Member State in the following six categories:

- **Main European trade bodies:** Trade bodies are the main stakeholders responsible for increasing business opportunities of European companies and improving their visibility at international level. This section includes European trade bodies and the main national trade bodies active at European/international level.
- **Europe-wide rights management associations:** Europe is the world region where the practice of collective rights management is most established, especially for some sub-sectors such as music. Collective management organisations, however, exist also for many other sectors and now European associations of national collective management organisations have been established to further support copyright and related rights. This category encompasses the European collective rights management association (where they exist) as well as the main national rights management bodies that are members (if particularly active at international level).
- **Relevant trade fairs and festivals:** Some of the world's largest trade fairs of relevance to CCIs take place in Europe, from visual arts, to cinema, music, fashion and design.
- **Main public institutions and bodies** supporting internationalisation of CCIs in the EU Member States.
- **Programmes of EU Member States** to support the internationalisation of their CCIs.

These stakeholders for CARIFORUM's Arts & Craft sector are listed in the following table.



Table A3-1: List of stakeholders for Arts & Craft in the selected EU Member States

Type of stakeholder	Name	Website
Main European Trade Bodies	World Crafts Council Europe <sup>9</sup>	<a href="http://www.wcc-europe.org/">http://www.wcc-europe.org/</a>
	UEAPME ( <i>Union Européenne de l'Artisanat et des Petites et Moyennes Entreprises</i> ) is the employer's organisation representing the interests of European crafts, trades and SMEs at EU level.	<a href="http://www.ueapme.com/spip.php?rubrique1">http://www.ueapme.com/spip.php?rubrique1</a>
Main National Trade Bodies	Artex – Centre for Artistic & traditional handicrafts in Tuscany (IT)	<a href="http://www.artex.firenze.it/">http://www.artex.firenze.it/</a>
	Ateliers d' Art de France (FR)	
	Craft Council UK (UK)	<a href="http://www.craftscouncil.org.uk/">http://www.craftscouncil.org.uk/</a>
	Craft Council Nederland – CCNL (NL)	<a href="http://www.craftscouncil.nl/">http://www.craftscouncil.nl/</a>
	Craft Scotland (UK)	<a href="http://www.craftscotland.org/">http://www.craftscotland.org/</a>
	Danish Arts and Crafts Association (DK)	<a href="http://www.danskekunsthaandvaerkere.dk/english">http://www.danskekunsthaandvaerkere.dk/english</a>
	Danish Crafts & Design Association (DK)	<a href="http://www.dkkh.dk">www.dkkh.dk</a>
	German Crafts Association (DE) ( <i>Bundesverband Kunsthandwerk</i> )	<a href="http://www.bundesverband-kunsthandwerk.de/cms/front_content.php?idart=117&amp;idcat=68&amp;lang=1">http://www.bundesverband-kunsthandwerk.de/cms/front_content.php?idart=117&amp;idcat=68&amp;lang=1</a>
Main trade fairs and festivals	Biennale for Craft and Design (DK)	<a href="http://biennalen.dk">biennalen.dk</a>
	Crafts Fair at Frue Plads in Copenhagen (DK)	<a href="http://www.craftsfair.dk">www.craftsfair.dk</a>
	EUNIQUE - arts & crafts trade fair in Karlsruhe (DE)	<a href="http://www.eunique.eu/en/fachmesse_2/die_messe.jsp">http://www.eunique.eu/en/fachmesse_2/die_messe.jsp</a>
	European Fine Arts Foundation (TEFAF) Masstricht (NL)	<a href="http://www.tefaf.com/">http://www.tefaf.com/</a>
	Foire de Paris (FR) – world culture	<a href="http://exposer-gb.foiredeparis.fr">http://exposer-gb.foiredeparis.fr</a>
	Import Shop Berlin/Bazaar Berlin (DE)	<a href="http://www.importshop-berlin.com">www.importshop-berlin.com</a>
	International Frankfurt Fairs Ambiente and Tendance (DE)	<a href="http://ambiente.messefrankfurt.com/frankfurt/en/besucher/willkommen.html">http://ambiente.messefrankfurt.com/frankfurt/en/besucher/willkommen.html</a>

<sup>9</sup> One of the five regional branches (Africa, Asia, Latin America, North America and Europe) of the World Crafts Council (WCC). The WCC is an international, non-governmental, non-profit organisation founded in 1964. Its general objectives are to strengthen the status of crafts as a vital part of cultural and economic life, to promote a sense of fellowship among the craftspeople of the world and to offer them encouragement, help and advice. It is recognised by UNESCO.



Type of stakeholder	Name	Website
		<a href="http://www.messefrankfurt.com">www.messefrankfurt.com</a>
	Collect, London (UK)	<a href="http://www.craftscouncil.org.uk/collect/">http://www.craftscouncil.org.uk/collect/</a>
	Venice Biennale of Art (IT)	<a href="http://www.labiennale.org/en/art/index.html">http://www.labiennale.org/en/art/index.html</a>
	Salon International du Patrimoine Cultural (FR)	<a href="http://www.patrimoineculturel.com/">http://www.patrimoineculturel.com/</a>
	Salone del Mobile (home furnishing), Milan (IT)	<a href="http://cosmit.it/">http://cosmit.it/</a>
	Maison&Objet (design, crafts, interior architecture), Paris (FR)	<a href="http://www.maison-objet.com/">http://www.maison-objet.com/</a> , <a href="http://www.bijorhca.com">www.bijorhca.com</a>
Public bodies	Funarte (ES)	<a href="http://www.fundesarte.org/en">http://www.fundesarte.org/en</a>
Public programmes	ACERCA programme (ES)	
	Danish Crafts & Design Programme (DK)	
	GULDAGERGÅRD - International ceramic research center for the development of ceramic arts	<a href="http://www.ceramic.dk/Engelsk/Ceramic.htm">http://www.ceramic.dk/Engelsk/Ceramic.htm</a>
	Network of Cultural Export (FI)	<a href="http://www.kulttuurivienti.fi/en.php?k=11430">http://www.kulttuurivienti.fi/en.php?k=11430</a>
	Wales Art International (UK)	<a href="http://www.wai.org.uk/">http://www.wai.org.uk/</a>
Public bodies dealing with development and/or trade	Agence française pour le développement (FR)	<a href="http://www.afd.fr/jahia/Jahia/home">http://www.afd.fr/jahia/Jahia/home</a>
	Agency for Development and Cooperation (AECID) (ES)	<a href="http://www.aecid.es">http://www.aecid.es</a>
	Dutch Centre for International Cultural Activities (SICA) (NL)	<a href="http://www.sica.nl/en/node/19986">http://www.sica.nl/en/node/19986</a>
	ICEX (Spanish Institute for Foreign Trade) (ES)	
	UK Trade & Investment (UK)	
	Danish Centre for Culture and Development (state agency) (DK)	<a href="http://www.dccd.dk/dccd/cku.nsf">http://www.dccd.dk/dccd/cku.nsf</a>
	KreaNord (DK and FI and other countries of Nordic region)	<a href="http://www.kreanord.org/en/about-kreanord">http://www.kreanord.org/en/about-kreanord</a>
Public programmes for the Caribbean Region	Caribbean Aid for Trade and Regional Integration Trust Fund (UK)	
	Commonwealth Foundation, Creative industries exchange	<a href="http://www.creativeindustriessexchange.com/">http://www.creativeindustriessexchange.com/</a>
	Compete Caribbean programme (UK)	